

TAXSLAYER TAGS AND NOTES 01-01-20

Code	Description	Tag	Note with examples
MIS001	Missing Information		Taxpayer is missing documentation. Taxpayer will return w/info. Note Example: MIS001 Diane is missing W2.
DNT001	Do Not Transmit or refused to file	Paper Return	Do not transmit return because of client refusal or questionable information provided Note Example: DNT001. Diane decided to go to HR Block. Note Example: DNT001. Diane refused to file return.
PAP001	Paper Return	Paper Return	The taxpayer will mail in tax return (federal, state, or both) Note Example: PAP001. Diane will mail in her return.
REJ001	Tax Return Rejected		Tax Return was submitted but rejected for various reason such as incorrect SS#, wrong name. REQUIREMENT - If a tax return is rejected, the taxpayer must be contacted through phone or letter and a note must be placed on the tax return. Note Example: REJ001. Return Rejected due to Spouse's Social Security.
REJ002	Tax Return Rejected: Client Contacted	Tag the return as a Paper Return only if the taxpayer was contacted 3 times with no response	Tax Return was submitted and rejected. Contacted Customer. REQUIREMENT - The taxpayer should be contacted at least three separate times with corresponding notes Note Example: REJ002. Contacted Customer @ 480-123-4647. Left message @ 7pm. Note Example: REJ002. Contacted Customer. Sent a letter to taxpayer address on 3/3/20. Note Example: REJ002. Contacted Customer a 2nd time @ 480-123-4647. Left message @ 4:30pm.
SAZ001	State Return		AZ State return only Note Example: SAZ001. AZ State return only.
PTC001	140 PTC		Filed for AZ Property tax return Note Example: PTC001. PTC return.